BB&T Scott & Stringfellow

JIMENEZ & PATE FINANCIAL GROUP

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BB&T Scott & Stringfellow

HIGHLIGHTS

- 1893 – Frederic William Scott and Charles S. Stringfellow, Jr., entered a partnership to establish a full-service retail brokerage and investment banking firm in Richmond, Virginia.
- 1999 – Scott & Stringfellow became part of BB&T Corporation. With shared values and dedication to clients' well-being, the organizations aligned perfectly, bringing expanded and complementary capabilities to each.
- 2013 – We blended our names to become BB&T Scott & Stringfellow. The connected names reflect the scope and impact of the fully integrated, collective resources our financial advisors are able to deliver in conjunction with the resources available through BB&T.
- BB&T Scott & Stringfellow has 60 offices in Virginia, West Virginia, Kentucky, North Carolina, South Carolina, Georgia, Alabama, Florida, Maryland, Pennsylvania, and Texas. Together with BB&T Capital Markets and BB&T Securities, we employ over 1,000 associates.
- 2017 – The Jimenez & Pate Financial Group moved their practice to BB&T Scott & Stringfellow.

OUR TEAM

The Jimenez & Pate Financial Group serves corporations, business owners, executives, and those planning for retirement.

Drawing on over 55 years of combined experience, we help our clients manage the complexities of qualified retirement plans, executive bonus plans, corporate cash management strategies, risk management strategies, and retirement income planning. Using our in-depth knowledge and planning specialties, we gain a careful understanding of our clients' goals and objectives to develop a well-thought-out strategy and an accompanying plan of action. We deal with several aspects including strategy, compliance, and solutions.

We believe helping clients achieve results congruent to their objectives is our responsibility, helping them provide a positive impact beyond their expectations is our difference, and being their essential partner through the process is our mission.

The Jimenez & Pate Financial Group

BB&T Scott & Stringfellow

A division of BB&T Securities, LLC, member FINRA/SIPC

Scott & Stringfellow

WEALTH MANAGEMENT SERVICES

FOR INDIVIDUAL INVESTORS

529 Savings Plans
Annuities
CDs
Closed-End Mutual Funds
Common Stocks
Corporate Bonds
Dividend Reinvestment Programs
Exchange Traded Funds (ETFs)
Fee-Based Advisory Accounts
Goals-Based Investment Planning
Hedge Fund of Funds
Income-Generating Strategies
Initial Public Offerings
Insurance Products
Insured Deposit Program
Money Market Funds
Multi-Strategy Portfolios
Municipal Bonds
Mutual Funds
Mutual Fund Wrap Program
Options Strategies and Execution
Portfolio Evaluations
Preferred Stocks
Private Client Research
Professional Management Program
Retirement Planning
Separately Managed Accounts
Structured Products
Unified Managed Account Program
Unit Investment Trusts
U.S. Government Agency Securities
U.S. Treasury Securities
Zero Coupon Bonds and Funds

Our Service Commitment					
Financial Guidance	Legacy Implementation	Estate Coordination	Retirement Management	Risk Management	Tax Minimization

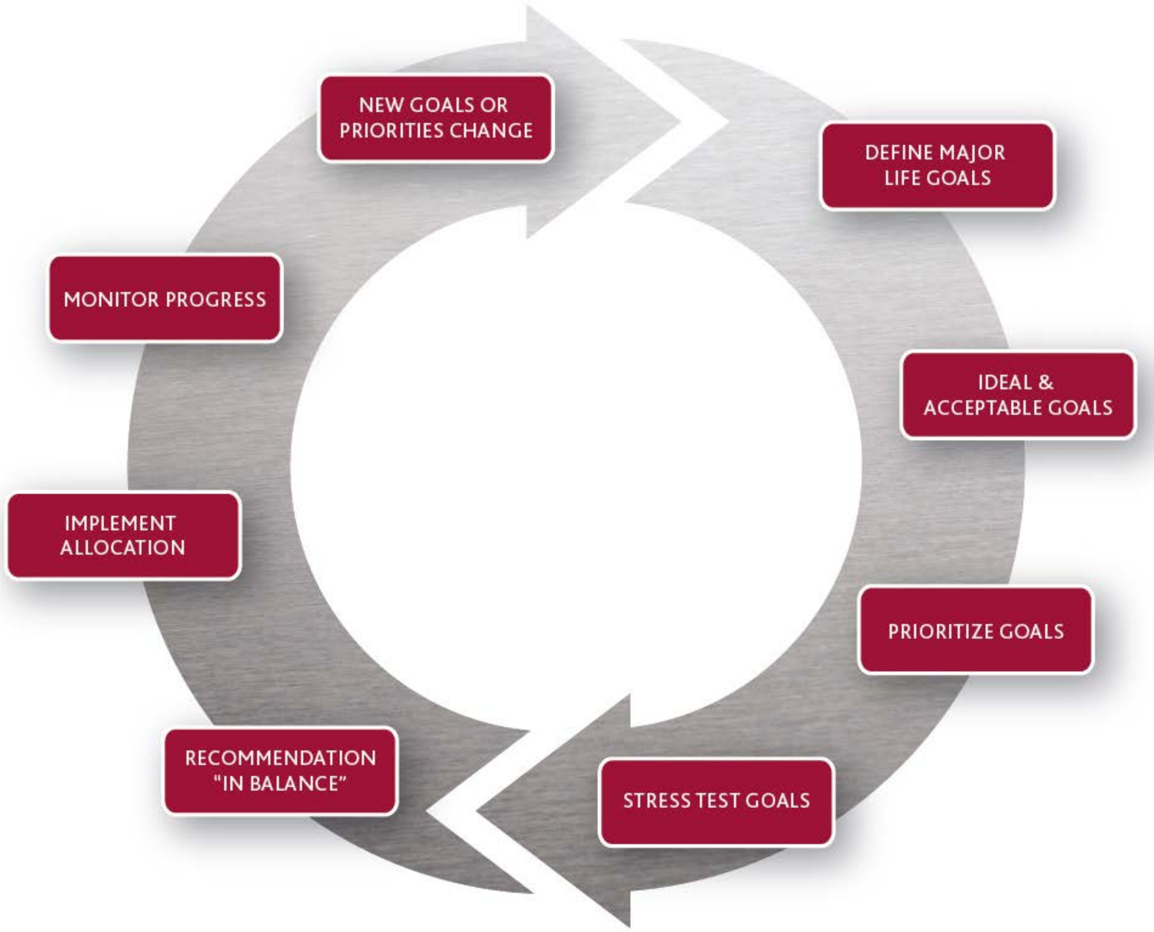
WEALTH MANAGEMENT SERVICES

FOR CORPORATE CLIENTS

- 401(k), 403(b), and Solo 401(k) Plans
- Asset Securitization
- Corporate Cash Management
- Corporate Finance
- Corporate-Sponsored Retirement Plans
- Employee Stock Ownership Plans (ESOP)
- Equity Research
- Executive Bonus Plans
- Fairness Opinions
- Municipal-Sponsored Retirement Plans
- Portfolio Evaluations
- Private Placements
- Risk Management Strategies
- Secondary Offerings
- Simplified Employee Pension Plans (SEPs)

Vendor Knowledge and Search Services	Support the Educational Process	Investment Experience	Communication	Service
Act as objective consultant	Assist you in meeting fiduciary obligations	Act as independent voice to help achieve your goals	Employee financial planning and education	Ongoing plan-level management and oversight
Streamline due diligence process	Review service agreement	Provide investment monitoring and reviews	Work with small groups and one-on-one	Annual plan review
Evaluate potential solutions	Oversee transitions and education	Keep you updated on latest offerings	Help participants properly allocate their portfolios	Communication through-out the process

OUR PROCESS



NEW GOALS OR PRIORITIES CHANGE
DEFINE MAJOR LIFE GOALS
IDEAL & ACCEPTABLE GOALS
PRIORITIZE GOALS
STRESS TEST GOALS
RECOMMENDATION "IN BALANCE"
IMPLEMENT ALLOCATION
MONITOR PROGRESS

MANUEL JIMENEZ, IV, RICP®, CRPC®, CRC®
Financial Advisor

With more than 29 years in the financial services industry, Manuel "Manny" Jimenez specializes in providing retirement income planning, risk management, and estate planning solutions for his clients. Manny also brings vast experience in developing income distribution plans for retirees and providing wealth management strategies for individuals. His extensive background in pension design, 401(k) plan design, and portfolio management enables him to create comprehensive exit strategies, including Employee Stock Ownership Plans (ESOPs) for business owners and corporate executives. Manny is a PMP portfolio manager through BB&T Scott & Stringfellow.

Throughout his career, Manny has lectured and conducted retirement and investment training at The Citadel, Charleston Southern University, and Santee Cooper. He also was commissioned by the Office of Personnel Management to teach The Financial Strategies for Successful Retirement course for the Charleston Naval Shipyard.

Manny is an active member of St. Theresa's Catholic Church finance and building committees. He also is very involved with the Coastal Carolina Council of Boy Scouts of America, where he served as scoutmaster for four years and is currently a district commissioner for the council.

A member of the National ESOP Association and the Carolina ESOP Association, Manny holds several professional designations. He earned his Retirement Income Certified Professional (RICP®) designation from The American College, and his Certified Retirement Counselor® (CRC®) and Certified Retirement Administrator (CRA) designations through the International Association for Retirement Education (InFre). In addition, Manny earned his Chartered Retirement Planning Counselor (CRPC ®) designation through the College of Financial Planning. He is a graduate of The Citadel with a bachelor's degree in biology, and a United States Army veteran.

Manuel Jimenez, IV, RICP, CRPC®, CRC®
Senior Vice President
Financial Advisor

WALTER C. PATE, CFP®, CLU®, CLTC®
Financial Advisor

Walter C. Pate, CFP®, CLU®, CLTC®
Financial Advisor

Since beginning his financial services career in 1996, Walter Pate has been dedicated to delivering personalized investment management solutions with the utmost level of professionalism and integrity. He deeply believes in the development of a sound financial plan to ensure long-term success.

Walter spent 15 years with a large financial corporation as a regional director managing a team of over 120 financial advisors. He was responsible for ongoing training on all aspects of the financial planning process, hiring new advisors, and driving sales results in all financial lines of business.

Drawing on over 21 years of experience, Walter specializes in risk management, retirement income planning, and asset management. He also develops tax-efficient strategies and succession plans for successful business owners, in addition to insurance and long-term care solutions.

Walter is a member of the Financial Planning Association, National Association of Financial Advisors, and National ESOP Association. He holds the CERTIFIED FINANCIAL PLANNER™, the Chartered Life Underwriter®, and the CLTC® Certification for Long-Term Care professional designations. He is a graduate of The Citadel with a bachelor's degree in mathematics. He and his wife, Ginger, have six children. Walter enjoys time with the family and is an avid runner.

TAYLOUR E. SCHUTTER
CLIENT SERVICE ASSOCIATE

Since beginning her career in the financial sector in 2016, Taylour has been involved in several different aspects of the business including client service, retail lending, mentoring, and digital enhancement.

Taylour started with BB&T in 2017 as a retail banker, joined the Jimenez & Pate Group in 2020, and serves as the direct extension of the team's advisors and primary liaison in all client relationship matters. She is accountable for the team's daily operations management as well as ensuring the team remains in compliance with both the firm and industry standards and regulations.

Born into a military family, Taylour grew up moving around, however, she calls Clarksville, Tennessee home. She relocated to Charleston, South Carolina in early 2020. She earned her bachelor's degree in English with a minor in history from Austin Peay State University. Taylour enjoys reading, rooting for the Oklahoma Sooners, and she and her husband, Mat, are expecting their first child in November 2020.

DISCLOSURES

Comments regarding tax implications are informational only. BB&T Scott & Stringfellow and its representatives do not provide tax or legal advice. You should consult your individual tax or legal professional before taking any action that may have tax or legal consequences. The information included herein may be from outside sources that are believed to be reliable, but no verification of that information has been performed.

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